



**ITA Office of Human Resource Management  
Strategic Plan 2005-2007**

**Paving the Way to Becoming a Strategic Business Partner**



# Office of Human Resource Management Strategic Plan 2005-2007

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### Executive Summary

#### OHRM Overview

The Office of Human Resource Management's (OHRM) Strategic Plan 2005-2007 outlines areas of management focus, provides organizational direction, and presents initiatives to be implemented over the next three years. Reporting to the Chief Financial Officer/Director of Administration (CFO/Admin), OHRM is the primary provider of human resource services to ITA's program units and five other Bureaus of the Department of Commerce. OHRM's vision is to be a trusted strategic business partner in the overall management of human capital by providing world-class human resource management services.

As the Federal Government is faced with an aging workforce, need for succession planning, and competition with the private sector, OHRM needs to identify required skill sets and capabilities and retain high performing employees. In addition, the President's Management Agenda (PMA) and the Office of Personnel Management (OPM) have each provided guidance and initiatives that require OHRM to develop a strategic plan and prioritize its focus for the next three years.

#### OHRM Challenges

During interviews with customers and leadership, OHRM identified several challenges and improvement opportunities. If OHRM is to successfully manage human capital, serve as a strategic advisor to its customers, and provide excellent customer service, then it must improve in these areas:

- **HR Processes:** Recruiting and staffing process is lengthy and confusing; and transaction processing is lengthy and often inaccurate.
- **Customers and Partners:** The method of serving customers and the level of service are inconsistent across groups; customer relationships are not based on a partnering philosophy.
- **Organization:** OHRM is viewed as regulatory and reactive rather than proactive and helpful. Multiple points of contact, poor communication across groups, and inadequate cross-functional capabilities contribute to this perception.
- **Products and Services:** The products and services offered by OHRM do not fully meet customers' most urgent needs. OHRM's customers lack succession plans and do not work with OHRM to actively manage a plan to ensure a skilled, diverse workforce. Partnering with customers for training programs is inconsistent and communication is ineffective.

#### Future Direction of OHRM

To address these challenges, OHRM will concentrate on four strategic areas:



This focus will enable OHRM to:

- Streamline processes and create new processes to meet customer needs,



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- Create a customer and partner-focused organization to improve customer service,
- Realign the organization to support customer needs and build strong human resource capabilities, and
- Realign existing products and services and create new products and services.

By concentrating on these areas and implementing related initiatives, OHRM will become more customer-focused and will achieve its vision of being a strategic business partner with its customers.

Strategic Areas of Focus	OHRM Initiatives
Core HR Processes	<ul style="list-style-type: none"><li>- Enhance the recruiting and staffing process</li><li>- Reduce the time to process transactions</li></ul>
Customers and Partners	<ul style="list-style-type: none"><li>- Improve customer service</li><li>- Build partnerships with customers</li></ul>
Organization	<ul style="list-style-type: none"><li>- Become a strategic organization</li><li>- Realign the organization to improve the customer experience</li><li>- Develop strong human resources skills and capabilities (e.g., customer service, training, recruiting, etc.)</li></ul>
New Products and Services	<ul style="list-style-type: none"><li>- Create a plan for future staffing needs (includes strategies for attracting and hiring resources as well as developing skills)</li><li>- Establish a consolidated training program and curriculum framework</li><li>- Expand career development and retention programs</li><li>- Improve the awards program</li><li>- Realign products and services to better address customer's needs</li><li>- Realign products and services to better address customer needs</li></ul>

OHRM's future role will be defined by new value-added relationships with customers and business partners. The focus will be on client services, strategic advice, and performance enhancement.

Organizationally, OHRM will achieve this by creating an initial single point of contact for customer interactions for each group and redefining roles and responsibilities into six categories: HR Leader, HR Relationship Manager, HR Expert, HR Transaction Expert, HR Support, and HR Technologist. By addressing the organizational, process, and customer service challenges and improving its capabilities, OHRM will be positioned to better work with its customers.



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### **I. Introduction**

This Strategic Plan for the Office of Human Resource Management (OHRM) defines the strategic direction and outlines primary areas of focus for the next three years. It describes challenges that affect customer service and key initiatives to address them. The plan is a roadmap to improve processes, develop and improve products and services, and become a strategic business partner to customers. It benefits both OHRM and its customers. OHRM can use the plan to lay out activities to achieve key objectives. Customers gain a better understanding of the initiatives that OHRM will undertake to address their needs.

To develop the Strategic Plan, OHRM identified key customers, senior leadership within its office, and other Department of Commerce (DOC) key contacts to provide input on customer needs and identify key areas of focus. This input was used to understand the operating environment and ensure that the plan would satisfy customer, partner, and stakeholder needs.

The Strategic Plan is not meant to be a rigid document; rather it is meant to be flexible – to evolve as conditions change over the next three years. It should be updated as significant achievements are accomplished and new requirements are identified. As customers define new strategic priorities, we need to adjust OHRM's priorities to meet these changing needs.



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### II. Overview

The mission of the International Trade Administration (ITA) is to create economic opportunity for U.S. workers and firms by promoting international trade, opening foreign markets, ensuring compliance with trade laws and agreements, and supporting U.S. commercial interests at home and abroad. ITA faces new challenges daily as a result of the evolving backdrop of international trade. There are new markets to identify, new barriers that arise, new policies that affect trade, and new firms that seek ITA's assistance.

America's businesses depend on ITA's assistance in dealing with these challenges. ITA works with its customers and stakeholders to define strategies and develop programs to help American businesses to navigate the maze of international trade. ITA has been successful at establishing itself as the public sector leader in providing export assistance.

In addition to the external difficulties of working in a global marketplace, ITA faced unique challenges arising from ITA's reorganization which occurred in August 2004. These challenges emphasized the important role that the Human Resources function serves within the organization. In response to a Presidential mandate, ITA realigned the organization and business processes around changing business priorities and global trends. In order to effectively focus on its priorities, ITA requires a high performing, strategically focused human resource office to support its new mission, vision, and organizational structure.

OHRM helps ITA's program units and the other bureaus manage their people in accordance with their strategic mission, goals, and objectives, as well as the direction provided by the HR function within the Department. Organizationally, OHRM reports to the Chief Financial Officer/Director of Administration (CFO/Admin), who serves as the principal adviser to the Under Secretary and Deputy Under Secretary on financial and management policy for ITA. The CFO/Admin also operates ITA-wide management processes for finance and human resources, coordinates ITA's strategic planning and performance measurement, performs program evaluations, and provides general administrative services.

The missions of the five other bureaus are unique, and are equally important to the overall mission of the Department.

#### A. OHRM Vision

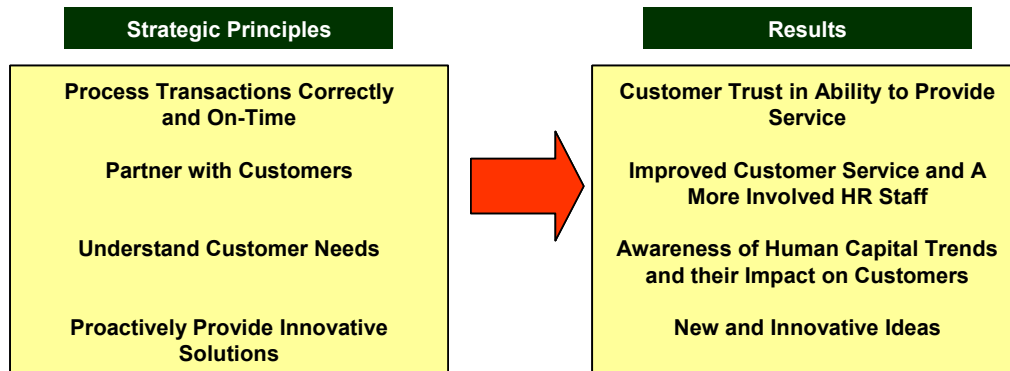
OHRM's "Vision for the Future" reflects its goal to serve as a strategic business partner in managing human capital and deliver high value service to its customers. It addresses both where the organization will be in three years and how it will operate. OHRM's vision statement commits to create a different future for the organization.

**To be a trusted, strategic business partner in the overall management of human capital, by providing world-class human resource management services.**



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OHRM's vision requires significant change in order to deliver on the following strategic principles and achieve the following results:



To be a high quality service provider and a strategic business partner, OHRM must participate in major organizational decisions that affect ITA. OHRM must consistently demonstrate the highest level of service and support to its customers. By bringing issues and solutions to customers' attention and developing stronger relationships, OHRM will play a greater role in shaping the strategic direction of its customers and responding with a human capital strategy that supports the mission of ITA and the other bureaus it serves.

### ***B. OHRM Mission***

OHRM provides HR services to the employees of ITA and five other bureaus. OHRM's mission statement highlights its core role within the organization and potential impact on ITA's ability to achieve its own vision.

**Attract, develop, and retain the right people, with the right skills, in the right jobs, at the right time, to carry out the mission of our customers.**

### ***C. OHRM Customers***

OHRM's customers are ITA employees, managers, and executives from the following units:

- Trade Promotion and U.S. and Foreign Commercial Services (US&FCS),
- Market Access and Compliance (MAC),
- Import Administration (IA),
- Manufacturing and Services (MAS), and
- Executive Direction/ Administration.

In addition, OHRM provides human resource services for five other bureaus within the Department of Commerce:

- Bureau of Economic Analysis (BEA),
- Economic Development Administration (EDA),





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- Bureau of Industry and Security (BIS),
- National Telecommunications and Information Administration (NTIA), and
- Minority Business Development Agency (MBDA).

Collectively, these six groups represent about 3,000 OHRM customers.

### *D. OHRM High Level Goals and Objectives*

To fulfill its mission and its vision, OHRM has established three overarching performance goals. Each has a set of objectives and measures that focus on near term outcomes. Each year as priorities change and ITA's strategic direction evolves, these objectives and measures will be reviewed and modified.



#### **GOAL #1** 1<sup>st</sup> Rate Customer Service

To ensure OHRM provides first rate customer service, it will strive to improve its overall score on the next customer satisfaction survey. Also, any report of an onsite evaluation of OHRM programs by OPM or the Department will contain no serious major findings.

Over FY05 OHRM will improve customer service by increasing HR technical competencies through:


- Training, including workshops
- Improving responsiveness to customers
- Increasing awareness of OHRM products and services
- Providing tools to help customers with HR problems



#### **GOAL #2** Strategic Business Partner

To become a strategic business partner, OHRM defined these objectives:

- Improve understanding of customers' mission and business to effectively support customers' human capital needs
- Increase consultation and collaboration with managers
- Participate in at least one meeting each quarter with senior staff of other serviced bureaus to provide HR advice and consultation in support of strategic business objectives
- Align training/development programs with customer's strategic goals
- Present to the SPLT at 40% or more of their meetings



#### **GOAL #3** Effective Service Delivery

Develop and implement at least three customer-focused initiatives that improve service delivery each year. Areas of focus in FY05:

- New employee orientation
- SES hiring cycle
- Alternative Dispute Resolution
- Payroll and benefits processing
- HR publications
- ITA sponsored training



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### *E. Progress Towards Goals*

Over the past year, OHRM has made significant progress. Specifically,

- **SES Performance Plans:** Worked with the Senior Executive Service (SES) of ITA and other bureaus to develop a strategy for linking goals and objectives to individual performance plans. During a workshop session, the OHRM team worked with the senior executives to identify key measures to build into their plans. The team provided individual assistance to the executives to update their plans to reflect this strategic perspective.
- **ITA Reorganization:** Supported ITA in restructuring its organization and realigning its business process, products, and services to meet the changing global environment and business priorities, including coordinating a buyout and early retirement program. Worked with the Program Transformation team to identify human resource issues and new capabilities and skills.
- **Leadership Training:** Began working with Program units to develop and implement a new leadership training curriculum for ITA and an internal competency model to identify employees' training needs. The curriculum includes redesigned course offerings for supervisors and managers. The focus is on preparing these individuals for leadership roles and reinforcing the key characteristics of effective leaders in the Federal marketplace.
- **New Employee Orientation:** Supported the development of a new ITA employee orientation program that provided information on becoming a Federal employee, an ITA employee, and, more specifically, a trade specialist at ITA.
- **Customer Satisfaction Survey:** Conducted a survey to better understand customers' needs and areas of focus. Survey findings were used to prioritize programs and identify additional products and services that OHRM can offer to better respond to customers' needs.
- **PMA Scorecard:** Partnered with the Department to get to "Green" on the PMA scorecard for Human Capital Management. Critical areas of development for ITA OHRM: reporting on ITA organization structure, closing the competency gaps, and increasing diversity.
- **C<sup>3</sup>Q:** Established a dimension to customer service that includes cooperation, communication, collaboration and quality (C<sup>3</sup>Q).
- **Communication/Marketing Strategy:** Developed a communication and marketing strategy to ensure that human resource information is properly communicated to customers.



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### F. OHRM Organizational Structure

OHRM is organized into four groups, as shown below:

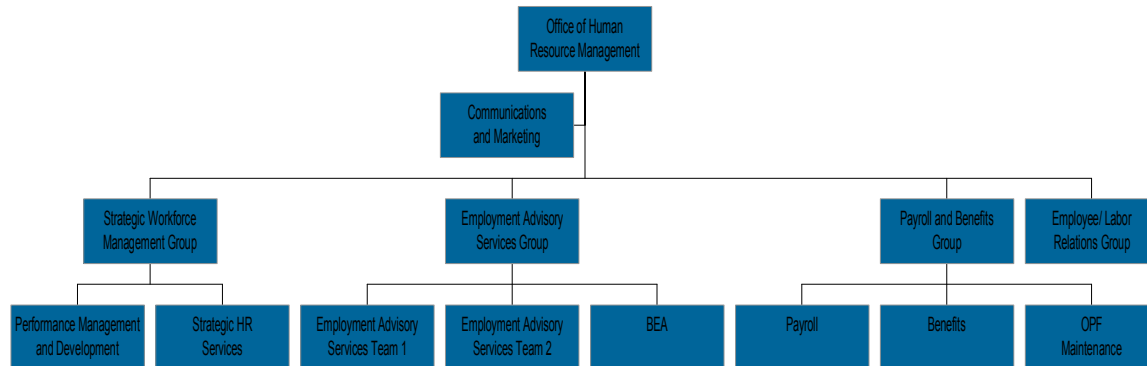


Figure 1 - Current OHRM Organizational Structure

### G. OHRM Functions

In accordance with its responsibilities, OHRM and the groups provide products and services in these 10 functional categories.

Each group within OHRM creates and delivers products and services to its customers and stakeholders.

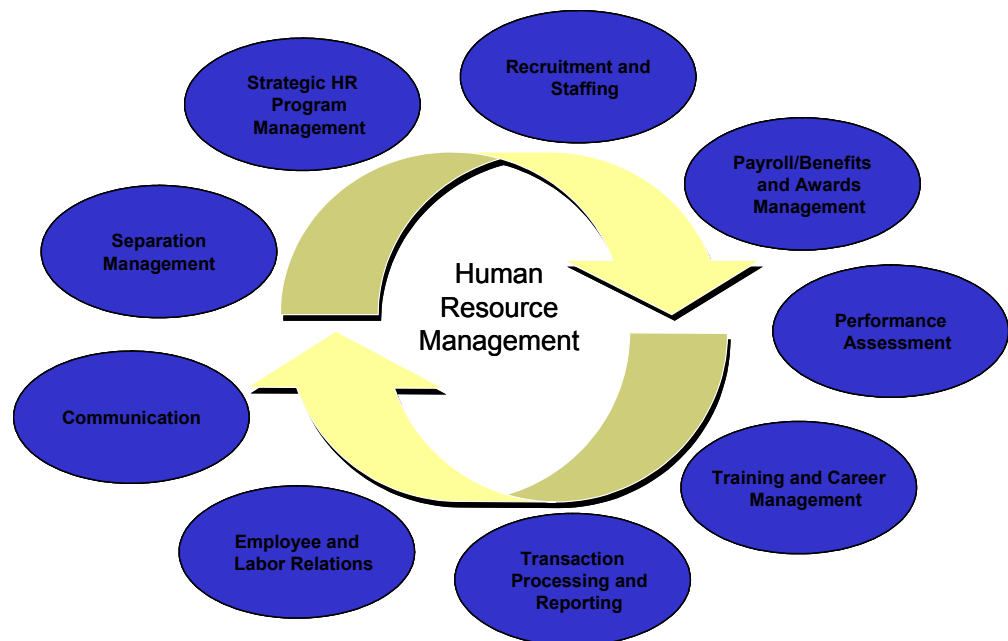


Figure 2 - OHRM Functional Categories



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### III. Current Environment

OHRM and the HR community face challenges that are reflected in workforce trends in the Federal Government, including an aging workforce, new required skill sets and capabilities, and competition from the private sector. In addition, the President's Management Agenda (PMA), and the Office of Personnel Management (OPM) have set out guidance and initiatives that affect OHRM. Due to these trends, PMA, OPM initiatives, and changing customer needs, OHRM formulated a business strategy that will guide its change to a strategic organization with enhanced processes, products, services, and capabilities.

#### A. *President's Management Agenda (PMA)*

The PMA was established in Fiscal Year 2002 to reform the management and performance of the Federal Government.<sup>1</sup> The President's plan included five Government wide initiatives selected to help achieve this reform: strategic management of human capital, competitive sourcing, improved financial performance, expanded electronic government, and budget and performance integration. Strategic Management of Human Capital has the most relevancy to OHRM and the services it provides.

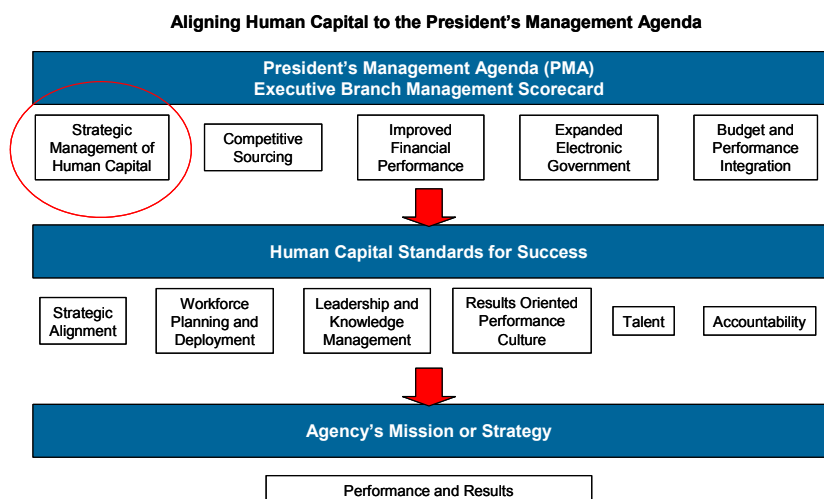


Figure 3 - Aligning Human Capital to the PMA

*Strategic Management of Human Capital* means having processes in place to ensure the right people are in the right jobs, at the right time, and are not only performing, but performing well.

<sup>1</sup> Letter from the Director of the Office of Personnel Management



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### B. Office of Personnel Management (OPM) Initiatives

During a time of reduced budgets and higher expectations, OPM expects HR offices within the public sector to effectively and efficiently manage their resources. In order to assist these offices with this directive, OPM has provided leadership and guidance on some key areas:

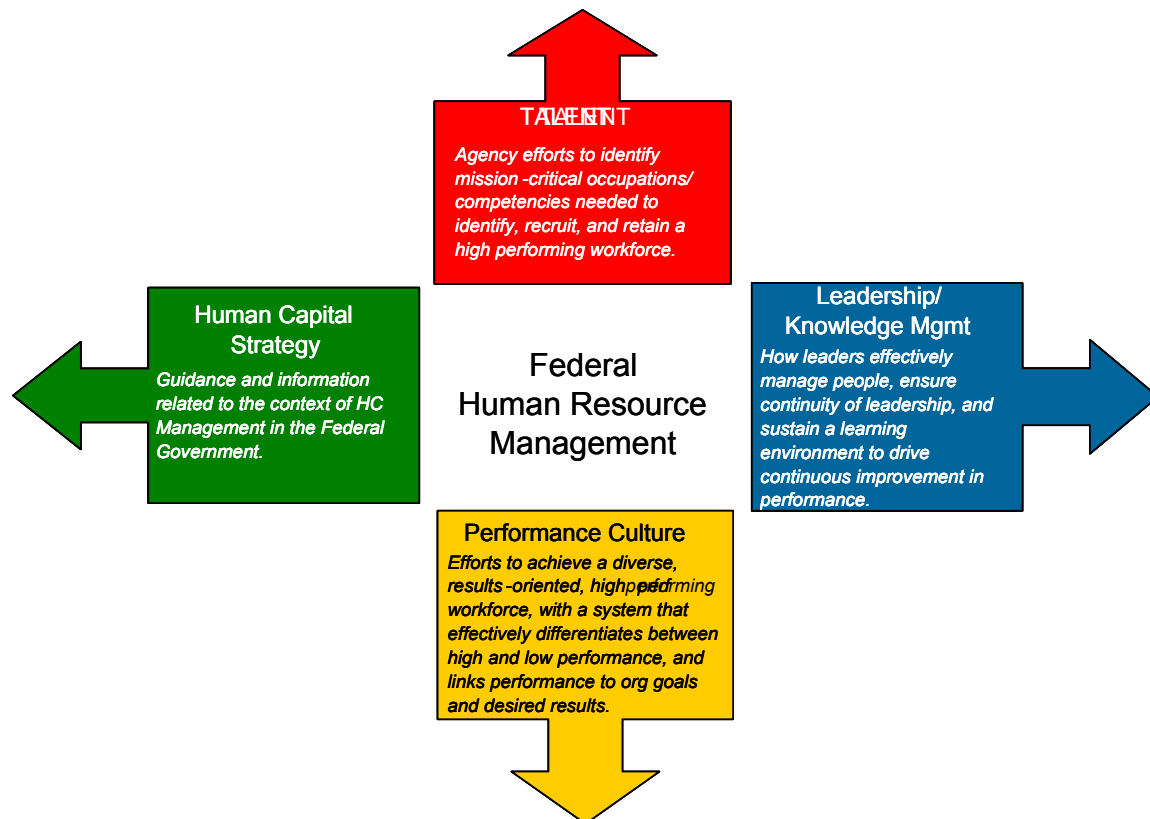


Figure 4 - OPM Initiatives



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### IV. OHRM Challenges

According to feedback received during interviews with ITA leadership and customers, OHRM has several challenges to overcome to meet their customer needs and deliver the type of products and services required. As OHRM changes into a strategic organization built on best practices, each challenge will be addressed with initiatives and programs over the next three years.



#### Process

- The OHRM **recruiting and staffing processes and procedures** are lengthy and often confusing for customers. The current recruiting process lacks flexibility and is not taking advantage of OPM's flexibility in hiring.
- **Transaction processing** (e.g., personnel action processing, payroll/benefit actions) is a manual and heavily paper-based process that is often lengthy and transactions are often inaccurate.



#### Customers & Partners

- OHRM **customer interactions** vary across the groups. Some groups use a teaming approach to service customers; others depend more on the knowledge and availability of individuals.
- OHRM does not have a strong **customer service** reputation. Customers reported that customer service varies from one employee to the next.



#### Organization

- Customers view OHRM as a **regulatory and reactive service provider**. They want a more proactive OHRM that helps them plan for the strategic management of human capital and is accountable to their customers.
- The OHRM organization is structured so that OHRM customers have **multiple points of contact** for products and services. Customers have a point of contact(s) assigned to them for each group. For example, if a customer has a recruiting question and a payroll question, the customer will have to contact individuals from two separate groups to answer the questions.
- When customers have inquiries, they often **do not know what group or individual to contact** and will reach out to an OHRM employees they know or have worked with in the past.
- OHRM **lacks cross group/cross team communication**, which prevents OHRM from understanding the comprehensive set of human capital issues faced by its customers.
- OHRM does not have strong **cross-functional capabilities**. Most employees have expertise in one human resource function.



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### New Products & Services

- OHRM **products and services** are **incomplete and out-of date**.
- OHRM does not actively manage a **resource strategy or plan** to ensure a highly skilled and diverse workforce for ITA and the bureaus.
- OHRM lacks a **succession plan** for ITA leadership and critical functions and skills.
- Customers do not consistently partner or coordinate with OHRM to develop **training plans** and/or courses and often create their own.
- ITA's **awards program** is not viewed as being effectively managed or publicized. Customers are unaware of the awards offered, the submission process, and the award timelines. Also, the awards do not adequately encourage high performance.
- The training function does not have strong skills throughout the entire **training lifecycle** (e.g., design, development, and delivery).
- The **OHRM website** is difficult to navigate, does not have a consistent look and feel, and does not provide customers with frequently asked questions or user-friendly information on products and services.
- Customers receive a large number of communications from the Department of Commerce, ITA, and other bureaus. **OHRM needs to differentiate its communications and reevaluate its communications strategy and distribution to fully leverage all CFO/Admin vehicles.**



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### V. Strategic Focus

To achieve its vision and meet customer needs, OHRM will concentrate on four strategic areas: improvements in core HR processes, customers and partners, organization, and new products. Within each strategic area, OHRM developed initiatives that will address each challenge and change the organization into one that is viewed by customers as a strategic partner. In addition, OHRM will improve customer service, streamline processes, build new capabilities, and enhance products and services. Through these initiatives, OHRM will achieve its vision of being a strategic business partner with customers.

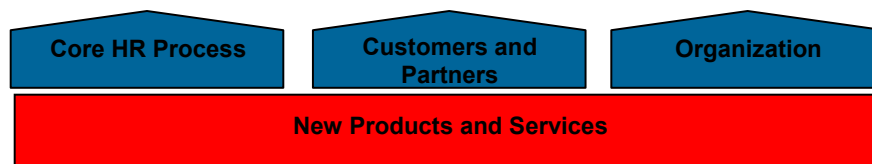


Figure 5 - OHRM Strategic Framework

#### 1. Reengineer Current Processes and Create New Processes to Better Meet Customer Needs.

- a. **Improve recruiting and staffing to reduce the timeline to attract and hire candidates.** An enhanced recruiting and staffing process will enable ITA and the Department of Commerce to compete for top candidates. A streamlined process will help to attract and hire the best for ITA. Specific emphasis will be placed on how to identify and attract diverse candidates to ITA positions.
- b. **Reduce the time spent processing transactions so that more resources can be devoted to strategic priorities.** By increasing its efficiency, OHRM will be able devote more time and resources to strategic and advisory tasks.

As OHRM creates an environment where HR transactions and processing become routine and supported by technology, it will be able to commit more attention and resources to working with leadership to develop HR programs that directly contribute to achieving ITA's strategic vision.

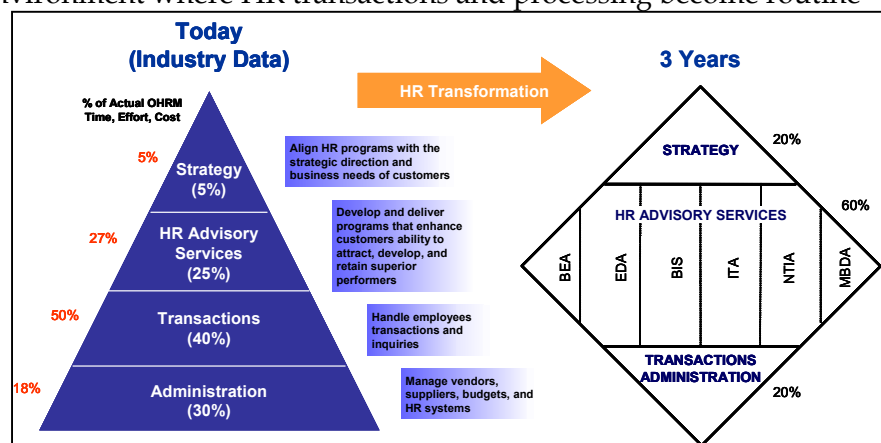


Figure 6 - OHRM Change Model





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2. **Create a customer and partner-focused organization to improve customer service.**
  - a. **Excel at customer service.** OHRM will focus on delivering excellent customer service to ensure that OHRM customers receive the highest level of support possible.
  - b. **Build partnerships with HR customers.** OHRM will build trust through relevant, accurate, and consistent service, and thereby build partnerships with customers.
3. **Realign OHRM organization to support customer needs and build strong capabilities.**
  - a. **Be a more strategic organization.** OHRM will add value to its customers by supporting them in identifying and achieving their human capital goals. OHRM's strategic focus will enable it to become a trusted advisor, providing counsel on workforce planning, generating creative HR solutions to business problems, and supporting customers as a true partner.
  - b. **Realign the organization for consistent customer interaction.** For each customer segment, there will be a point of contact whose role is to provide excellent and consistent customer service and foster the customer relationship.
  - c. **Build human resource capabilities.** OHRM will enhance its knowledge, skills, and abilities through training and other workforce development opportunities. In addition, it will cross-train employees to further develop general HR knowledge and deep expertise in one or more HR areas. Expanded HR knowledge and skills will ensure that inquiries are accurately addressed in a timelier manner. OHRM will ensure that its people have the appropriate competencies and skills to do their jobs by requiring all relationship managers (see new Operating Model) acquire SHRM certification. This, combined with the HR certificate program and other supplemental training (e.g., customer service, problem solving, consultation skills, etc.) will provide a cadre of highly qualified individual to place in critical HR positions.
4. **Realign Existing Products and Services and Create New Products and Services.**
  - a. **Establish a core training program.** Comprehensive training plans will benefit ITA and other bureaus by providing a well-organized, consistent, centrally coordinated training program. This coordinated approach to managing training will eliminate redundancy and leverage economies of scale.
  - b. **Focus on career development and retention to ensure employees have the right skills at the right time to meet mission critical needs.** Career development and retention programs coordinated with the program units and bureaus will enable OHRM to monitor workforce models and proactively identify developmental opportunities that address needs.
  - c. **Improve award programs to increase awareness and reward high performance.** OHRM will ensure that information regarding awards is properly communicated to all employees, managers, and executives and that existing programs are revised to reward high-



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performing employees. Enhancing the awards program will help to retain employees and provide them an incentive to continue to perform well.

- d. **Market products and services through improved communication channels.** By utilizing multiple channels, OHRM will provide customers with a steady flow of relevant HR information.
- e. **Realign products and services.** Establishing a single owner for individual products and services will reduce the overlap between the OHRM organizations.



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### **VI. Future Role of OHRM**

In its new role, OHRM will be defined by value-added relationships with customers and business partners. The focus will be on serving clients, providing strategic advice, and enhancing business performance. By eliminating some of the challenges (organizational, process, and customer interaction), OHRM will be positioned to better work with its customers to fulfill their mission.

#### ***A. Operating Model***

An operating model defines the “end state” vision of the interaction between customers, products and services, and the organization. OHRM’s future operating model (Appendix A) will enable it to become a strategic HR organization that successfully partners with its customers. By defining a single point of contact for its customers, OHRM ensures a consistent and higher level of customer service. As OHRM changes, all groups and teams will adopt a teaming approach, which will enable OHRM to adequately backfill roles, easily redistribute tasks, and balance workload. A review of the core business processes will realign the products and services to minimize overlap between groups.

#### ***B. Organizational Structure***

To fulfill its vision, OHRM will need to change current roles and responsibilities so that it has the capacity to perform strategic services as well as support customers’ transactional requests. OHRM’s organizational design will incorporate four guiding principles:

- 1. Strategically align all HR services that OHRM units provide, so the focus is on value-added work and consistent service.**
- 2. Enhance OHRM’s capacity and capability to provide strategic and advisory services in addition to processing transactions.**
- 3. Restructure and simplify transaction processing units.**
- 4. Combine points of contacts for each major customer into a single group consisting of relationship managers that will provide strategic and advisory services to their customers.**

A group of HR Relationship Managers will serve as the single point of contact for all HR-related inquiries, as well as in an operational role to answer the majority of HR inquiries. Having a single point of contact will simplify the customer experience and increase responsiveness. It will also help to foster a stronger relationship between the HR Relationship Management team and each customer. In turn this will enable the Relationship Manager to anticipate customer needs and provide more strategic services based on those needs.

In addition to consolidating the transaction processing function into a single group, the new structure will realign products and services to reduce redundancy and apply human resources best practices.

To achieve this end state, OHRM needs to consider these steps:



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- **Develop strong HR capabilities:** Doing so supports the HR Relationship Manager role. Employees will need to know how to perform multiple HR functions from a strategic perspective. HR Relationship Managers will be SHRM certified in addition to passing the HR certificate program and attaining supplemental skills in customer service, problem solving, and consultation).
- **Learn the business of customers:** OHRM employees will improve their knowledge of their customer's business which will enable them to proactively respond to HR issues and provide more strategic solutions.
- **Consider organizational realignment:** Once the HR capabilities are improved, OHRM should assess the organization to determine the best organization structure to support the HR Relationship Manager role and to align and add products and services.
- **Improve communication:** Communicating clearly and appropriately will give customers a better picture of the products and services that OHRM provides.

### *C. Roles and Responsibilities*

To fulfill the vision and successfully function in the new organizational structure, six roles are identified: HR Leader, HR Relationship Manager, HR Expert, HR Transaction Expert, HR Support, and a HR Technologist. In most cases, these roles are not completely new, but were modified to operate with more of a strategic focus. Descriptions of these additional roles and responsibilities are set out below.

HR Role	Role Description
<i>HR Leader</i>	<p>Provides leadership to the HR program and community in developing and delivering HR products, services, and solutions that enhance customers' business success. Builds internal and external partnerships and coalitions supporting HR program effectiveness. Drives the HR strategy and associated initiatives.</p> <p>Provides general oversight and sets direction. Acts as primary point-of-contact in managing relationships and provides guidance to team members.</p> <p>Typically an Office or Group Chief.</p>
<i>HR Relationship Manager</i>	<p>Works proactively with customers to understand and anticipate their business and workforce problems and to develop, propose and help implement solutions that support and enhance workforce performance. Partners with customers to address their human capital needs. This role provides the first point of contact for customers to address all of their human resource needs. These individuals will require SHRM certification in addition to passing the HR certificate program and attaining supplemental skills (e.g., customer service, problem solving, consultation, etc.).</p> <p>May be filled by a Group Chief or an HR Specialist.</p>



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HR Role	Role Description
<i>HR Expert</i>	<p>Acquires and applies a mastery of laws, regulations, policies, and practices in one or more designated HR disciplines. Develops policies and solutions that support and promote the overall effectiveness of the customers' workforce and organization. Primary responsibilities: to provide advice, stay abreast of developments in area of expertise, and provide guidance.</p> <p>Experts will be required in: SES Staffing, Benefits Administration, Recruiting, Position Classification, Training Cycle, Payroll, Employee/Labor Relations, and Separation Management.</p> <p>Typically an HR Specialist.</p>
<i>HR Transaction Expert</i>	<p>Processes personnel transactions accurately and efficiently and builds and maintains a complete and accurate workforce database both to meet federal requirements and to provide a reliable tool for workforce tracking and planning.</p> <p>Typically an HR Specialist or HR Assistant.</p>
<i>HR Support</i>	<p>Supports other HR roles (e.g., HR expert) in executing activities. Is skilled in one or more area(s) of the group or team in which tasks are performed.</p> <p>Typically an HR Assistant.</p>
<i>HR Technologist</i>	<p>Develops, applies, and maintains automated tools and solutions to facilitate the effective and resource-efficient delivery of HR products and services to customers. Responsible for providing technical expertise needed in OHRM to allow associates to use the necessary suite of systems to gather analytical data and compile data into reports for analysis.</p> <p>Typically an IT or HR Specialist.</p>

Table 1: New HR Roles and Responsibilities



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### VII. Strategic Plan Initiatives

Within each of the areas of focus, we defined initiatives that will begin OHRM's change to a more strategic organization. This section of the Strategic Plan begins to identify steps that OHRM needs to take to strategically manage human capital, develop a high performance workforce, provide quality customer and partner services, and align products and services.

#### A. OHRM Strategic Initiatives

#### Core HR Processes

<b>Enhance Recruiting and Staffing</b>	<ul style="list-style-type: none"><li>- Reengineer the staffing processes to reduce the time between posting a vacancy announcement and issuing an offer letter.</li><li>- Publish the recruiting and staffing processes, including timeframes and dependencies, on OHRM's website.</li><li>- Support customers throughout the recruiting and staffing process.</li><li>- Expedite the process of using a certificate by working with the managers to identify the best candidates for each position.</li><li>- Develop innovative recruiting strategies to address hard to fill positions.</li><li>- Develop strategies for attracting a diverse workforce.</li><li>- Identify incentives for attracting top candidates (e.g., bonuses, student loan repayment, and flexible work schedules).</li></ul>
<b>Reduce Transaction Processing Time</b>	<ul style="list-style-type: none"><li>- Identify and implement technology to automate transactions and allow customers to submit all paperwork electronically.</li><li>- Post frequently used personnel forms (paperwork) online.</li><li>- Identify and implement technology to allow electronic submission of awards nominations.</li><li>- Identify and implement technology to electronically manage recruiting actions.</li><li>- Fully utilize the LMS to electronically manage all aspects of employee training.</li></ul>



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### Customers and Partners

<b>Excel at Customer Service</b>	<ul style="list-style-type: none"><li>- Develop a customer feedback process to track customer satisfaction.</li><li>- Develop and publish specific customer service standards (inquiry response time, SF-52 processing timeframe, etc.).</li><li>- Identify standard practices for interacting with customers (e.g., standard greeting, inquiry scripts, customer updates).</li><li>- Establish and communicate back-up procedures.</li><li>- Create a script of key questions to ask customers who are requesting specific HR services.</li></ul>
<b>Build Partnerships with HR Customers</b>	<ul style="list-style-type: none"><li>- Utilize customer feedback and input to develop new programs and create new approaches to solve HR problems.</li><li>- Partner with managers and executives to identify and plan for workforce needs.</li><li>- Establish standing meetings with customers to understand their business and help them best use their resources to meet key objectives.</li></ul>

### Organization

<b>Become a Strategic Organization</b>	<ul style="list-style-type: none"><li>- Develop and deliver programs that enhance the ability to attract, develop, and retain superior performers.</li><li>- Provide leadership in human capital solutions, manage major personnel reorganizations, and offer relevant advice to managers about under-performing employees.</li></ul>
<b>Realign the Organization for Consistent Customer Interaction</b>	<ul style="list-style-type: none"><li>- Assess the current organizational structure and realign according to the new operating model.</li><li>- Create a HR Relationship Management team to provide strategic services to major customer groups.</li><li>- Consolidate the transaction processing functions.</li></ul>
<b>Build a Strong Human Resource Capabilities</b>	<ul style="list-style-type: none"><li>- Identify required skills and skill gaps within OHRM.</li><li>- Develop a training curriculum for OHRM employees and managers.</li></ul>



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	<ul style="list-style-type: none"><li>- Use LMS to track the training courses requested and attended by OHRM employees and managers.</li><li>- Require SHRM certification for all HR Relationship Managers in addition to passing the HR certificate program and attaining supplemental skills (e.g., customer service, problem solving, consultation, etc.).</li></ul>
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### New Products and Services

<b>Plan for Future Resource Requirements</b>	<ul style="list-style-type: none"><li>- Develop succession plans for ITA leadership positions and positions that require critical skills.</li><li>- Provide customers with support in succession planning efforts.</li><li>- Develop relationships and alliances with businesses, universities, and other associations to plan strategies for identifying and recruiting a diverse and high performing workforce.</li><li>- Develop a marketing strategy to attract employees by emphasizing the options available to Government employees and benefits of a career in Government.</li><li>- Monitor supervisory ratios (recommended 1:10 supervisor to employees).</li></ul>
<b>Establish Core Training Program and Curriculum Framework</b>	<ul style="list-style-type: none"><li>- Create a curriculum framework to assess ITA's training needs.</li><li>- Develop and manage core training for customers.</li><li>- Identify relevant training requirements for each position.</li><li>- Coordinate with customers to build programs for specialized training.</li><li>- Identify and develop flexible training schedules and class types to ensure that employees are able to maximize their training without interfering with work tasks.</li><li>- Develop an in-depth orientation program to introduce new employees to employment with the Federal Government.</li></ul>
<b>Expand Career Development and Retention Programs</b>	<ul style="list-style-type: none"><li>- Analyze skills to identify gaps in mission critical needs.</li><li>- Create a career development framework that will help employees understand their options within ITA and the Department of Commerce.</li><li>- Develop a retention strategy that addresses critical patterns of loss based on exit interview information.</li></ul>





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<b>Improve the Award Programs</b>	<ul style="list-style-type: none"><li>- Assess the awards program to identify awards that are not utilized or meeting customer needs.</li><li>- Identify new awards and/or modify existing ones.</li><li>- Develop a communication plan to communicate the awards, submission process, and award timeline.</li></ul>
<b>Market Products and Services through Improved Communication Channels</b>	<ul style="list-style-type: none"><li>- Assess effectiveness of communication vehicles (e.g., website, newsletter, email).</li><li>- Identify communication vehicles to publicize products, services, and events effectively.</li><li>- Publish OHRM processes and procedures through the appropriate communication vehicles.</li><li>- Post an up-to-date OHRM organization chart and contact sheet on the website.</li><li>- Create a communication network for distributing communications to employees, managers, and executives.</li></ul>
<b>Realign Products and Services</b>	<ul style="list-style-type: none"><li>- Align products and services to reduce group overlap and better address the strategic needs of customers.</li><li>- Survey customers to identify which products and services map to the employee lifecycle, as well as what products customers use and need.</li></ul>

### *B. New Products and Services*

To provide a higher level of support based on the lifecycle of an ITA employee, OHRM should develop or enhance nine more products and services.

#### **Strategic HR Program Management**

- **Organization Design** – provides the knowledge and skills to help customers align their organization structure with their strategy.
- **Best Practices Benchmarking** – supplies a process for identifying best practices in HR management and leverages these best practices when developing solutions for OHRM's customers.
- **Workforce Planning and Analysis** – provides the ability to assess the human capital needs of customers based on new positions, retirements, and general attrition.
- **Succession Planning** – creates a list of designated replacement candidates for critical positions and development plans for these candidates to prepare them to advance into those positions.
- **Talent Management** – presents a comprehensive solution for effectively acquiring, developing, and retaining high performing individuals in critical positions.



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- **Retention Strategies** – furnishes tools and initiatives (e.g., reward and recognition programs and motivation models) for retaining employees.

### **Training and Career Management**

- **Competency and Skills Assessment** – assesses employees' competencies and skills against the customers' competency model.
- **Training Needs Assessment** – identifies training needs based on analysis of competency and skill gaps.

### **Employee/Labor Relations**

- **Alternative Dispute Resolution** – provides an approach for early intervention and dispute resolution for labor and employee relations issues.



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**C. OHRM Workforce Future Capabilities**

In a Section VII.C, we identified six new roles for the future OHRM organization. Each of these roles requires a set of capabilities that OHRM employees need to succeed as the HR function evolves over the next three years. The table below includes a set of capability improvement areas which identify those capabilities that should be enhanced over time to support the strategic vision of OHRM.

HR Role	Required Capabilities	Capability Improvement Areas
<i>HR Leader</i>	<ul style="list-style-type: none"><li>• Decision-making</li><li>• Leadership –thought leadership and team leadership</li><li>• Strategic planning</li><li>• Critical thinking</li><li>• Knowledge of the mission, culture, and business of customers</li><li>• Effective communication skills</li><li>• Ability to act professionally and build trust</li><li>• Ability to build partnerships/relationships</li><li>• Ability to influence others to take action</li><li>• Ability to understand and apply change process</li><li>• Knowledge of HR programs, laws, and practices and how they contribute to workforce/organizational effectiveness</li><li>• Ability to understand and apply business decision tools, such as business case development, cost-benefit analysis, risk analysis and return on investment</li><li>• Ability to see the big picture</li><li>• Ability to represent and advocate customers' position in external venues</li></ul>	<ul style="list-style-type: none"><li>• Strategic Planning</li><li>• Knowledge of customers' mission, culture, and business</li><li>• Building partnerships/relationships</li><li>• Ability to understand and apply business decision tools, such as business case development, cost-benefit analysis, risk analysis and return on investment</li><li>• Ability to represent and advocate customers' position in external venues</li><li>• General HR knowledge (beyond that of current job area)</li></ul>



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HR Role	Required Capabilities	Capability Improvement Areas
<b>HR Relationship Manager</b>	<ul style="list-style-type: none"><li>• Knowledge of the mission, culture, and business of customers</li><li>• General business expertise</li><li>• Knowledge across OHRM products, services, and processes</li><li>• Applied knowledge of customer service</li><li>• Effective communication skills</li><li>• Ability to build partnerships/relationships</li><li>• Knowledge of HR programs, laws, and practices and how they contribute to workforce/organizational effectiveness</li><li>• Ability to understand and apply the change process</li><li>• Critical Thinking</li><li>• Active Learning</li><li>• Knowledge of industry best practices</li></ul>	<ul style="list-style-type: none"><li>• Knowledge of the mission, culture, and business of customers</li><li>• General business expertise</li><li>• Knowledge across all OHRM products, services, and processes</li><li>• Applied knowledge of customer service</li><li>• Written and oral communications</li><li>• Building partnerships/relationships</li><li>• Critical thinking and problem solving</li><li>• Policy interpretation</li><li>• Knowledge of industry best practices</li><li>• Ability to manage time and tasks effectively</li><li>• Consulting skills</li><li>• SHRM certification</li></ul>



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<b>HR Role</b>	<b>Required Capabilities</b>	<b>Capability Improvement Areas</b>
<b><i>HR Expert</i></b>	<ul style="list-style-type: none"> <li>• Knowledge of the mission, culture, and business of customers</li> <li>• Applied knowledge of customer service</li> <li>• Effective communication skills</li> <li>• Ability to build partnerships and relationships</li> <li>• Mastery of relevant HR laws and practices</li> <li>• Ability to analyze programs/ processes and measure results</li> <li>• Knowledge of applicable federal regulations</li> <li>• Project management</li> <li>• Critical thinking</li> <li>• Judgment and decision making</li> <li>• Business area expertise</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of the mission, culture, and business of customers</li> <li>• Applied knowledge of customer service</li> <li>• Oral and written communication</li> <li>• Ability to build partnerships and relationships</li> <li>• Mastery of relevant HR laws and practices</li> <li>• Policy interpretation</li> <li>• Critical thinking and problem solving</li> <li>• Consulting skills</li> <li>• Ability to manage time and tasks effectively</li> </ul>
<b><i>HR Transaction Expert</i></b>	<ul style="list-style-type: none"> <li>• Knowledge of the mission, culture, and business of their customers</li> <li>• Effective communication skills</li> <li>• Ability to work in teams</li> <li>• Knowledge of relevant HR laws and practices</li> <li>• Ability to use technology to improve efficiency and service</li> <li>• Ability to apply knowledge of customer service</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of the mission, culture, and business of their customers</li> <li>• Oral and written communication</li> <li>• Knowledge of relevant HR laws and practices</li> <li>• Ability to apply knowledge of customer service</li> </ul>
<b><i>HR Support</i></b>	<ul style="list-style-type: none"> <li>• Effective communication skills</li> <li>• Ability to work in teams</li> <li>• Ability to apply knowledge of customer service</li> <li>• Knowledge of mission, culture, and business of their customers</li> </ul>	<ul style="list-style-type: none"> <li>• Oral and written communication</li> <li>• Ability to apply knowledge of customer service</li> <li>• Knowledge of customer's mission, culture, and business</li> </ul>



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HR Role	Required Capabilities	Capability Improvement Areas
<b>HR Technologist</b>	<ul style="list-style-type: none"><li>• Analytical skills</li><li>• Understanding of HR operations and the impact of the systems they develop</li><li>• Broad knowledge of trends/ technology in automation field, with special emphasis on application in HR</li><li>• Ability to communicate effectively, especially with non-technologists</li><li>• Ability to influence others to take action</li><li>• Ability to use technology to improve efficiency and service</li><li>• Ability to understand and apply change process</li><li>• In depth knowledge of variety of current and evolving automated software, tools, systems, and techniques (especially IT Systems Knowledge)</li></ul>	<ul style="list-style-type: none"><li>• Broad knowledge of trends/ technology in automation field, with special emphasis on application in HR</li><li>• Ability to communicate effectively, especially with non-technologists</li><li>• Ability to influence others to take action</li><li>• Ability to understand and apply change process</li><li>• In depth knowledge of variety of current and evolving automated software, tools, systems, and techniques (especially IT Systems Knowledge)</li></ul>

Table 2: OHRM Future Capabilities

#### ***D. Infrastructure Needs***

As OHRM redirects its focus over the next three years, it will have to revamp the technology supporting its processes and procedures to meet customer needs. This overview discusses how technology can be leveraged to provide the highest level customer service possible.

#### **Automating Transactions**

OHRM can use technology to reduce the time consumed by transactions processing. Automating the transactions will reduce the timeframe required to process and sharply decrease the number of errors. A transactions processing system will:

- Automate all personnel actions and awards
- Enable recruitment actions to be submitted electronically
- Allow customers to submit SF-52s and supporting paperwork electronically
- Allow OHRM employees to check the SF-52s for accuracy and if no problems exist, the action will process directly into NFC
- Generate an electronic SF-50 once OHRM checked to ensure processing accuracy



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- Distribute the SF-50 by email
- Store all SF-50s in an electronic personnel folder maintained by PBG
- Allow customers to check the status of an action.

### Self-Service

OHRM can leverage technology to facilitate customer self-service. The goal of OHRM employee self-service is to allow customers to complete as many of the HR processes/procedures on their own and reserve OHRM contact for important decisions or difficult situations. Customers are willing to perform these types of tasks if the tools provided are intuitive and easy to use. OHRM must be proactive in creating tools that customers can use to resolve some issues and answer questions independently.

OHRM should focus on creating an employee portal. This web-based tool will be employees' one-stop-shop for their OHRM

inquiries, training requests, and knowledge management. The employee portal will leverage a comprehensive OHRM website that links to relevant internal and external resources as well as allows employees to perform simple transactions.

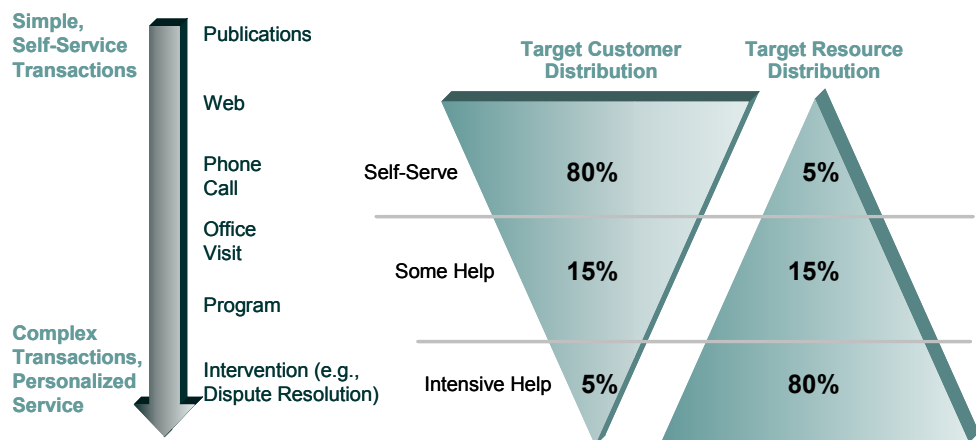


Figure 7 - Self Service Diagram

The employee portal should include:

- Links to the automated systems for recruiting, personnel processing, and awards
- Frequently used forms
- Links to Employee Personal Page (to change basic personal information)
- Information about employee benefits
- A connection to the Learning Management System
- A knowledge management page
- Guides on:
  - Basic personnel processes
  - More advanced workforce structuring issues (ex. Skills/gap analysis, workforce planning)
  - Managerial process/procedures (ex. How to use awards, performance assessment)
  - Steps required for recruitment actions

OHRM customers will be able to find answers to basic questions through the OHRM website or linked web resources. They will be able to place requests for personnel actions, awards processing, training



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and change of personal information electronically. This will reduce the time it takes customers to interact with OHRM and increase the accuracy of OHRM processes/procedures.

### **Learning Management System**

The system will electronically coordinate all aspects of the training process. It will leverage the internet to give customers self-service capability. The enhanced system will enable OHRM employees to shift their time from keying training requests to higher value added services focused on identifying employee training needs and developing training programs.

The system will use the internet to allow employees to:

- View training schedules
- Sign up for training
- View IDPs
- Request training authorization
- Receive authorization
- Schedule training
- Take computer based/ self paced training

The system will integrate:

- Training budget
- Core employee training
- Training curriculums/needs analysis
- Training authorization
- Training logistics/registration





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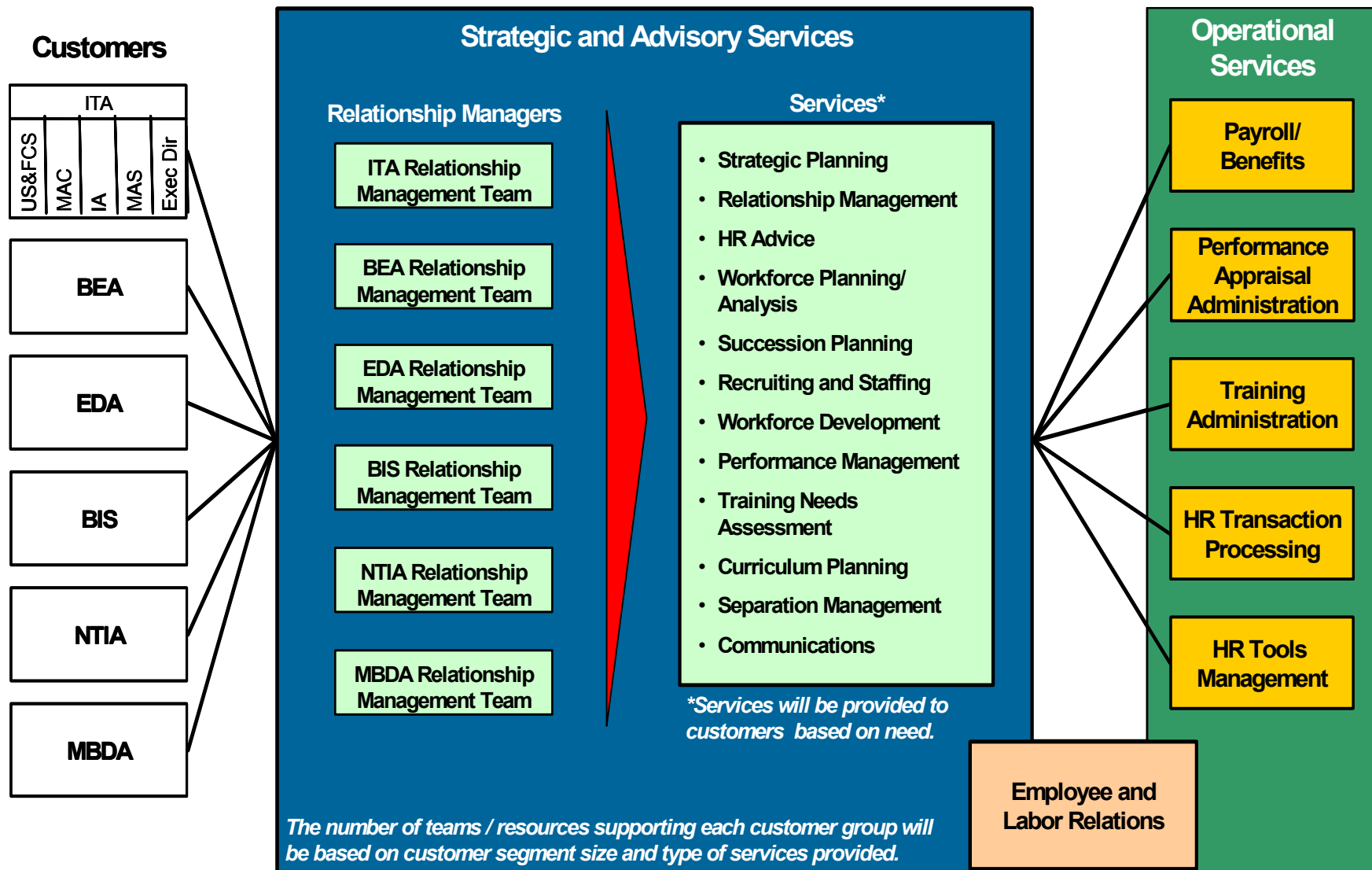
**Appendix A**

**Proposed OHRM End-State Operating Model**



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Future OHRM Customer Service/ Operating Model





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**Appendix B**  
**OHRM Customer Interviewees**



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Office	Name
ITA Manufacturing and Services	
	Robert Pearson
	Jeffrey Gren
	Marge Donnelly
	David Bowie
	Ron Erdmann
	Jane Corwin
	Ashley Miller
	Jean Janicke
ITA US& Foreign Commercial Service	
	David Tumblin
	Bill Meade
	Jennifer Holyfield
	Tom McGinty
	Julie Burch
	Deborah Anderson
ITA Market Access and Compliance	
	Logan Strohm
	Tyler Shields
Economic Development Administration	
	Stacey Au
	Brenda Davidson
Bureau of Economic Analysis (scheduled 1/5/05)	
	Joyce Whitman
<b>Contacted but did not respond</b>	
ITA Import Administration	Robert Goodyear
Bureau of Industry and Security	Andrea Jones
National Telecommunications and Information Administration	Tony Calza
Minority Business Development Agency	Toni Duckett



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**Appendix C  
Customer Interview Guide**



## Office of Human Resource Management Strategic Plan 2005-2007

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### Introduction

The Office of Human Resources Management (OHRM) is creating a strategic plan to clearly define the vision and goals of the organization for the next 5 years. In addition, this plan will help ensure OHRM has the necessary products and resources to meet the business goals of ITA and other customers. The goal of the project is to develop an OHRM strategic plan that aligns with and supports ITA and other customers' strategic plans and guides OHRM in the management of human capital.

As part of this process we are conducting interviews with OHRM's customers to help assess where the OHRM is today and where it needs to focus to best serve customers. The objectives of these interviews are to:

- Verify that OHRM is strategically meeting the needs of customers
- To get a customer perspective of the products and services provided by OHRM

This interview guide lists the questions that will facilitate our conversation about OHRM. These questions serve as a starting point and are not meant to prevent discussion of other matters you feel to be relevant. Your responses to these questions will be used as input for the strategic plan. We expect that the discussion will require 60 minutes.

### Interview Guide

#### Customer Background:

1. What is your position?
2. What HR processes are you involved in with your role? As an employee?
3. What is your interaction with OHRM? What various groups or individuals do you interact with?

#### Strategic Support:

4. How does OHRM help support your organization's strategic vision? What are the two most critical products/services for OHRM to deliver that would support your organization in achieving its strategy?
5. How do you view OHRM's role in your organization?
6. Do you view OHRM as a "strategic partner" (i.e., proactive and effective in helping you recruit, manage, support, and develop the best people to achieve your organization goals)?
7. In thinking about your current challenges in meeting your organization's (performance) goals, what role is OHRM playing to assist you?



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8. What would your ideal vision of OHRM's role be in adding value and supporting your organization?
9. What are the three main human capital challenges your organization is facing?

### **Products and Services:**

10. What products/services are you aware of that OHRM offers?
11. Which of their products/ services offered do you use most and want maintained by OHRM? As a manager and as an employee?
  - For each product/service please provide the following:
    - Satisfaction on a scale of 1 to 5
    - Value of the Service on a scale of 1 to 5
    - Provider of the service

<i>Product</i>	<i>Satisfaction</i>	<i>Value</i>	<i>Provider</i>

12. What are three typical requests that you make as a customer of OHRM? How frequently?
13. Are there products/services that OHRM does not offer that you would use regularly?
14. What information or data are you seeking from OHRM (e.g. reports, statistics, etc.)?
15. If you have any HR staff working internally within your organization, what services do they provide compared to what services OHRM provides?
16. In the past three months, how often have you contacted someone in OHRM? In the past year, how often has someone from OHRM proactively contacted you?
17. What have been the most important OHRM successes in your organization within the last 2 years and why are they important to your organization?



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**Appendix D  
OHRM Leadership Interviewees**





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Position	Name
Chief of Strategic Workforce Management	Darlene Haywood
Performance Management and Development Team Lead	Carol Davison
Chief of Employee Advisory Services	Allison Hopkins
BEA Team Lead	Deb Martin
EASG Team Lead	Rita Clinton
EASG Team Lead	Carmen Montgomery
Chief of Personnel Information Management	Brenda Bradley
Acting Chief of Employee/Labor Relations	Mike Stein
Director of Human Capital Planning and Management	Alethea Long-Green



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**Appendix E**  
**OHRM Leadership Interview Guide**



## Office of Human Resource Management Strategic Plan 2005-2007

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### Introduction

The Office of Human Resources Management (OHRM) is creating a strategic plan to clearly define the vision and goals of the organization for the next 5 years. In addition, this plan will help ensure OHRM has the necessary products and resources to meet the business goals of ITA and other customers. The goal of the project is to develop an OHRM strategic plan that aligns with and supports ITA and other customers' strategic plans and guides OHRM in the management of human capital.

As part of this process we are conducting interviews with OHRM leadership to help assess where OHRM is today in terms of roles and skills within the organization. The objectives of these interviews are to:

- Identify the current and potential organization structure and individual roles and responsibilities for your group
- Assess capability requirements and needs
- Identify improvement opportunities related to organization structure and individual roles that will enable OHRM to be successful

This interview guide lists the questions that will facilitate our conversation. These questions serve as a starting point and are not meant to prevent discussion of other matters you feel to be relevant. Your responses to these questions will be used as input for the strategic plan. We expect that the discussion will require 60 minutes.

### Interview Guide

#### Interviewee Background:

1. What is your position within OHRM? Who do you report to?
2. What is within your scope of responsibility? What are you accountable for?

#### Organization Structure, Roles, and Responsibilities:

3. Please outline the organization structure for your group.
4. What are the advantages / disadvantages to the current organization structure? How would you improve it?
5. What are employees' roles within that organization structure? How many employees perform each of the outlined roles?
6. What are the core business processes your organization is responsible for and contribute to?
7. What customer groups do those employees serve?



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8. What products and or services does your group provide to customers?

### **Capabilities**

9. What capabilities is everyone in your group required to have?

10. What capabilities are required for each role (activity) and what is the current level of proficiency? What level of proficiency is required?

- For each role please provide the following: Primary Activities, Required Capabilities, and Level of Proficiency (High, Med, Low)

<i>Role</i>	<i>Activity</i>	<i>Capability</i>	<i>Current Proficient</i>	<i>Future Proficiency</i>

### **Improvement Opportunities:**

11. What changes with respect to roles and responsibilities would improve customer service?  
Would add value to products and services?

12. Are there opportunities to be more efficient or effective with respect to the allocation of resources or the definition of roles? Do you feel your organization has appropriately allocated resources to accomplish your responsibilities?

13. Are additional roles and responsibilities required or could be added to increase effectiveness?  
Are there any which you would eliminate?

14. What training is currently being offered to equip these individuals with required capabilities?

### **Additional Questions:**

15. How do you as a leader partner with OHRM customers?

16. Do you view OHRM as a “strategic partner” with customers? If not, what does OHRM need to accomplish to become a strategic partner?

17. How do you ensure outstanding customer service is provided by your employees? Do you have ideas for increasing customer satisfaction?

18. Are their activities within your group that could be performed at the Department-level by Commerce OHRM?



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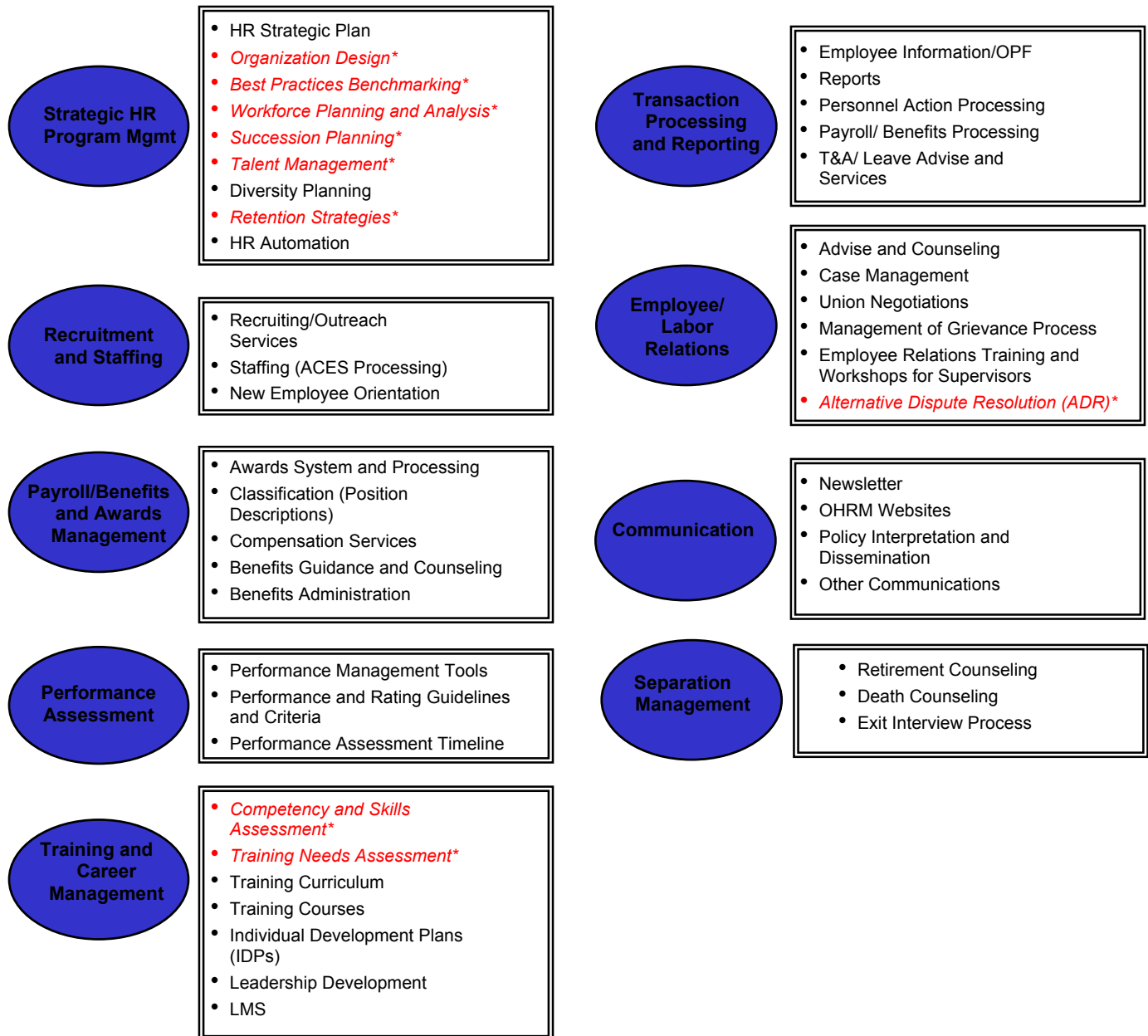
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**Appendix F**  
**OHRM Core Products and Services by Function**



## Office of Human Resource Management Strategic Plan 2005-2007

### OHRM Core Products and Services



*\*Denotes a future OHRM product.*